

Vermont Visitor Profiling Research

Economic & Policy Resources and VDTM

Portland Research Group

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Objectives

- Understand visitors' motivations for visiting Vermont
- Attitudes about what visitors like and dislike about locations visited
- Assess expectations and needs when visiting Vermont
- Identify the activities in which Vermont visitors partake while in Vermont
 - Passive and Active
 - Types of locations-museums, state parks, state forests, etc
- Determine activity-based segments to use potentially for target marketing (to be included in follow-up analysis)
- Determine Visitor media habits
- Garner demographic information including lifestyle characteristics (marital status, presence and age of children), employment status (retired), current residence, age, and household income.

Methodology

Respondent Criteria	<ul style="list-style-type: none">• *Recent visitors to the VermontVacation.com website who requested vacation planning information• 18 years or older• Visited Vermont in the past 12 months.
Respondent Counts	<ul style="list-style-type: none">• n=1283• Sample tolerance: +/- 2.7 percentage points at a 95% confidence level.
Data Collection	<ul style="list-style-type: none">• Data was collected using a self-administered web survey
Questionnaire	<ul style="list-style-type: none">• Forty two questions (several with parts) in a structured questionnaire.

*Please note all respondents are visitors to the Vermont website.

Methodology (cont)

Data Cleaning Specifications

- A “Did Not Answer” row was added to all unanswered questions and selected if no coding up could be done and the respondent should have answered the question.
- If a respondent mentioned a pre-coded answer in any “Other Specify” throughout the survey, the pre-coded answer was then selected and the Other Specify response deleted.
- If a respondent did not answer question 12 but continued to answer questions 13 through question 32, then question 12 was marked as “Yes”. Conversely, if a respondent did not answer question 12 and did not answer any question from 13 through 32, question 12 was coded as “No”.
- If a respondent answered “Yes” to question 12 and failed to answer questions 13 through 32, then “Did Not Answer” was recorded for all “screeners” questions (13,14b,18,20,22,24,26,28,30) between question 13 and 32.
- If a respondent answered “No” to question 12 and answered any questions between 13 and 32, those responses were deleted.

Methodology (cont)

Data Cleaning Specifications

- Questions 13 through 32:
 - If a respondent did not answer the screener questions (13,14b,18,20,22,24,26,28,30) but continued to answer the follow-up questions, the screener question was coded “Yes”. If they did not continue to answer the follow-up questions, then “Did Not Answer” was coded for the screener questions.
 - If a respondent answered “Yes” to a screener question and did not answer the follow-up questions, the follow-up questions were coded as “Did Not Answer”.
 - If a respondent answered “No” to a screener question and continued to answer the follow-up questions, the responses for the follow-up questions were deleted.

Methodology (cont)

Data Cleaning Specifications

- Questions 33 through 36b:
 - Any case where a respondent failed to answer a question, “Did Not Answer” was coded for their response.
- Questions 37 through 39:
 - Respondents were required to have answered all of these questions. If a respondent did not answer any or all of these questions, that respondent was deleted from the final data set.
- Questions 40 through 42d:
 - Again, if a respondent did not answer a question pertinent to them, “Did Not Answer” was coded as their response.
 - If question 40c was not answered and the respondent continued to answer questions 41a through 41c, question 40c was coded as “Yes”. If a respondent failed to answer question 40c and did not answer the follow-up question, question 40c was coded as “Did Not Answer”.
 - If a respondent said “Yes” to question 40c and did not answer questions 41a through 41c, “Did Not Answer” was recorded as their response for 41a through 41c. If a respondent said “No” to question 40c and continued to answer questions 41a through 41c, their responses to questions 41a through 41c were deleted.

Methodology-Subgroup Analysis

	<u>Total</u>
<u>Gender</u>	(n=1283)
Male	n=574
Female	n=679
<u>Age</u>	(n=1188)
18-44	n=356
45-54	n=384
55-60	n=448
<u>Income</u>	(n=1018)
Less than \$70K	n=371
\$70K to less than \$150K	n=521
\$150K+	n=126
<u>Education</u>	(n=1249)
Less than Bachelors	n=496
4 Year Degree	n=338
Some Graduate School/Graduate Degree	n=415
<u>Employment</u>	(n=1233)
Full-time	n=787
Part-time	n=118
Other (retired, self-employed, etc)	n=328
<u>Likelihood to Revisit Vermont</u>	(n=1283)
Likely (5,6)	n=824
Neutral (3,4)	n=243
Unlikely (1,2)	n=216

Key Findings

Visitors

- Seven in ten Vermont visitors traveled with two adults in their party.
 - Two fifths of respondents (44%) had one child in their party.
- Half of participants (49%) stayed in Vermont one to three nights, while a tenth (9%) visited for the day.
- Participants who stayed overnight chose a hotel/motel (50%) or a bed and breakfast/inn (28%) as their lodging of choice.
- Three quarters of visitors (75%) used their own personal vehicle to get to Vermont.
- While in Vermont, three fifths of visitors (58%) spent less than \$1000 for their entire trip.
 - About half of visitors spent less than \$200 for prepared meals and beverages (46%), shopping (47%) and groceries (53%).

Key Findings

Visitors and Activities

- Vacation was the primary motivator for a Vermont visit for three quarters of respondents.
 - While the majority of visitors participated in shopping (93%) and rest/relaxation activities (92%), their primary leisure endeavor was listed as viewing/learning/cultural activities.
 - Almost half of respondents (45%) engaged in an outdoor activity while in Vermont.
 - Nearly half of participants (45%) who took part in an outdoor activity used a state park, and would be likely to use a state park in the future.
 - Four fifths of participants (78%) who did not use a state park for their outdoor activity would consider using a state park in the future.

Key Findings

Vermont Reactions

- Respondents agreed that Vermont was a great vacation destination in the fall (86%), and associated Vermont with fall (59%) more so than any other season.
- Respondents were most likely to describe Vermont as “scenic,” and cited the mountains (39%) as the most attractive scenery.

Trip Planning

- Many participants relied on state sponsored materials when planning their trip.
 - Seven in ten respondents stated that state of Vermont brochures (69%) and the website (69%) were important information sources used when planning their recent trip.
 - Three quarters of participants (74%) agreed that they tend to obtain state/local brochures to help with trip planning.
 - Three in ten state park visitors (30%) first learned about Vermont state parks via a state sponsored website, while a quarter (24%) gained awareness through VTVacation.com.

Preliminary Recommendations

- Leverage the value of the website and information provided to attract additional visitors as well as returning visitors.
 - Many participants access the website or use the web in order to plan their trip and learn more about a destination. Many participants also seek out brochures and other promotional information provided by State departments. The website could become the “one-stop” for vacation planning.
- Revamp Vermont’s image as a year-round destination.
 - Most participants regard Vermont as a “fall” destination. Additional marketing could be done to entice visitors year-round by highlighting various viewing/cultural/learning activities, a primary leisure activity listed by Vermont visitors.
 - An opportunity exists to market Vermont as a summer destination among women, who were significantly more likely than men to agree that Vermont was a great summer destination.
 - The overall season orientation in descending order was fall, summer, winter and spring. More emphasis could be placed on Vermont as a summer destination.

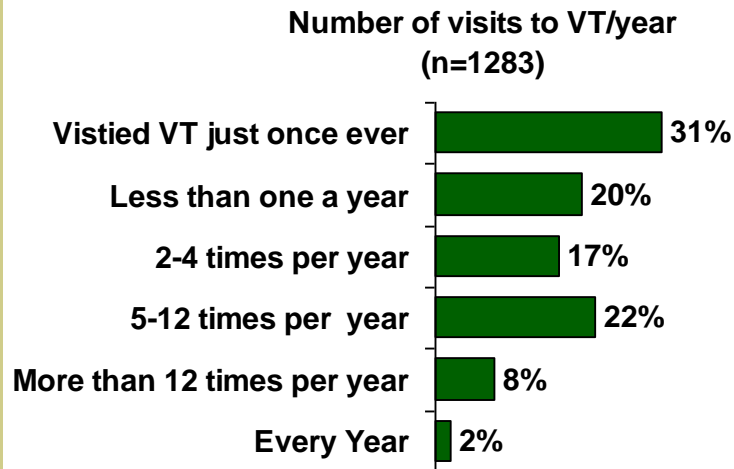
Preliminary Recommendations

- Market weekend or extended weekend (three or four day) vacation “getaways” for couples.
 - A third of participants (34%) did not have any children in their party.
 - With “vacation” listed as a primary driver for recent Vermont visits, an opportunity exists to target adults with limited time but have an interest in participating in non-child focused vacation activities.
 - One sixth of participants (16%) agreed that their vacations are centered around activities for their children.
 - One recommendation would be to highlight popular activities cited by respondents such as rest/relaxation amenities and shopping.
 - An additional recommendation would be to discuss a variety of dining options, as the majority of rest and relaxation participants ate out during their visit.
 - Further investigation is needed regarding those who visited an attraction (factory tours, amusement parks, etc) who were less likely to say they would visit Vermont again.
 - Incorporate language that reflects Vermont’s “scenic” nature.
 - This was a popular sentiment that visitors associate with the state of Vermont and a top reason listed for a return state park visit.

Detailed Analysis

Vermont Visitors

- Three in ten respondents have visited Vermont just once ever, while a fifth (22%) have visited Vermont between 5 and 12 times.
- October was the most popular month to visit Vermont (29%), with more than a tenth visiting in September (15%), August (14%), and July (13%).
 - Respondents were least likely to visit in April (1%), March (1%), or May (2%).



Base: Total respondents (n=1283)

- Q4. Have you visited Vermont for any purpose in the past 12 months?
- Q5. On average, how many times a year do you visit VT? (aided, single response)

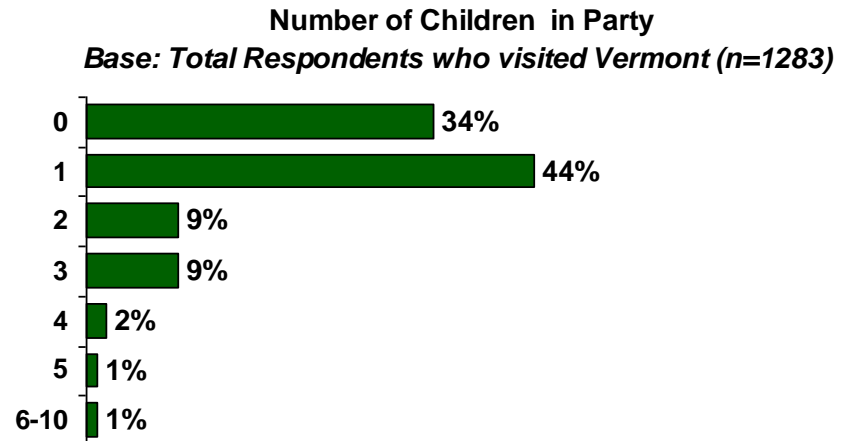
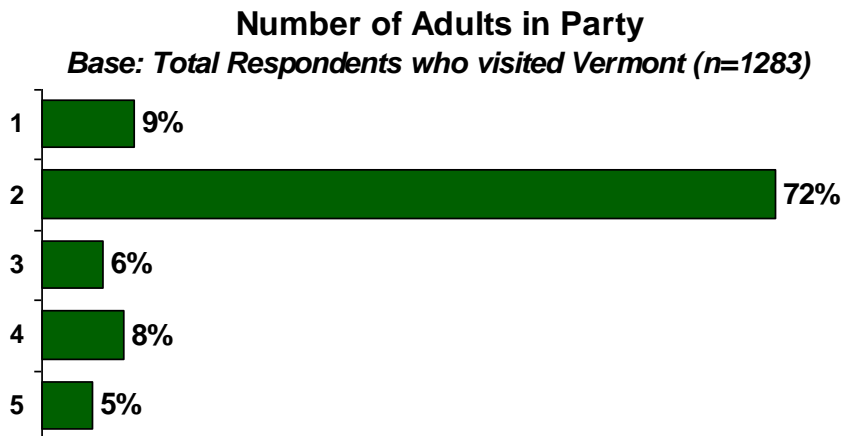
Base: Those who visited VT in the past 12 months and provided an answer (n=1195)

- Q5b. During what month did your most recent to VT occur? (aided, single response)

Top Five Months For Visiting Vermont	
Base: Those who visited Vermont and provided an answer	
(n=1195)	
October	29%
September	15%
August	14%
July	13%
December	6%

Vermont Visitors: Party Size

- The majority of respondents (72%) were accompanied by one adult during their trip to Vermont.
 - Respondents with an income of \$150,000 or more (79%) were significantly more likely to come with another adult than visitors with an income of less than \$70,000 (68%).
- Over two-fifths (44%) of Vermont visitors had one child under the age of 18 with their party, while over a third (34%) did not have any children traveling with them.
 - Respondents 55 and older (52%) were significantly more likely to have one child traveling with them than those 18-44 (36%) and 45-54 (42%).



Base: Total respondents (n=1283)

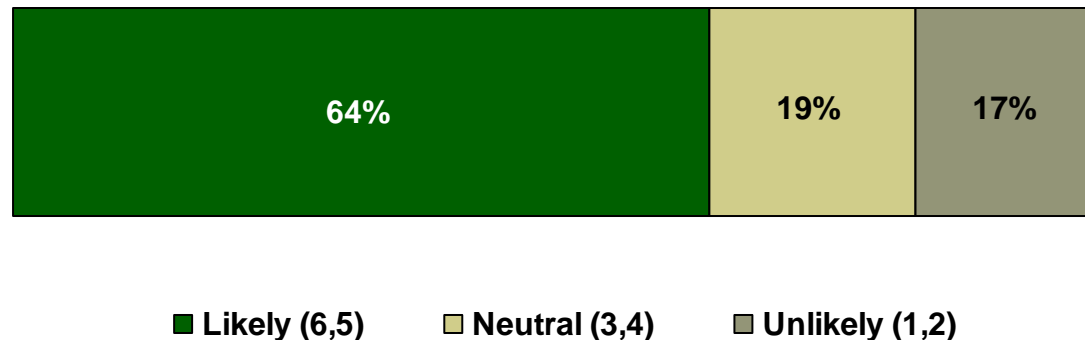
➤ Q4. Have you visited Vermont for any purpose in the past 12 months?

Base: Those who visited VT in the past 12 months (n=1283)

➤ Q7. Including yourself, how many travelers were in your most recent party? (aided, single response)

Vermont Visitors : Likelihood of Returning

- Two-thirds (64%) of respondents are likely to visit Vermont in the next 12 months.
 - A significantly higher percentage of respondents younger than 55 than those 55 and older reported that they would be likely to visit Vermont within the next year (69% vs. 58%).



Base: Those who visited VT in the past 12 months (n=1283)

- 34. How likely/unlikely are you to visit VT for any purpose in the next 12 months? (aided)
- Based on a six-point scale where 1 means "Unlikely" and 6 means, "Likely."

Transportation

- The majority of respondents (75%) used their private car to travel to Vermont.
 - Visitors aged 18-44 were significantly more likely to take their own cars than visitors 55 or older (79% vs. 72%). The latter were more likely to take their personal Recreational Vehicles (6% vs. 1%).

Modes of Transportation <i>Base: Those who visited Vermont</i>	
	(n=1283)
Auto-Private	75%
Airline - Commercial	16%
Auto - Rental	16%
RV-Private	3%
Motorcycle	3%
Boat/Ferry	2%
Bicycle	2%
Train	1%
Other**	2%

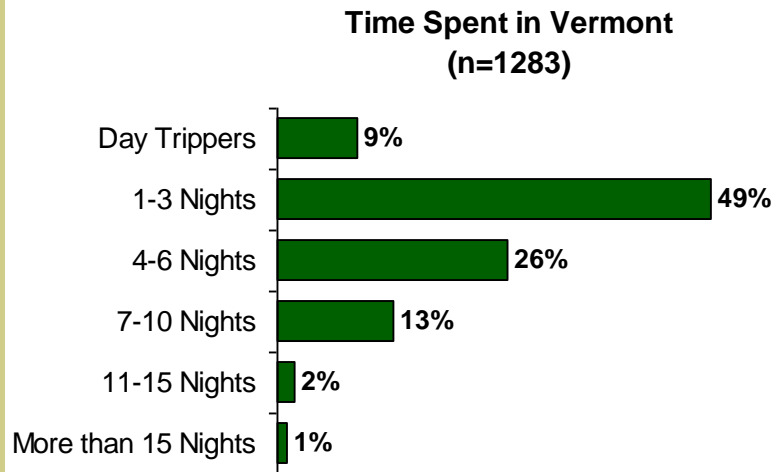
Base: Those who visited VT in the past 12 months (n=1283)

➤ Q8. What types of transportation did you use to travel to Vermont? (aided, multiple-responses)

**See Appendix for all responses

Staying in Vermont Overnight

- Half (49%) of visitors reported visiting Vermont for 1 to 3 nights during their last visit, while a tenth (9%) only stayed for the day.
- Half of respondents (50%) who spent a night stayed in hotel or motel at some point during their trip.
 - Over a third (37%) of people who stayed in a hotel or motel remained there for approximately 1 to 3 nights.



Types of Lodging	
Base: Those who stayed in Vermont overnight	
(n=1170)	
Hotel/Motel	50%
Bed & Breakfast or Inn	28%
Home of friend/relative	13%
Rental Home/Condo/Timeshare	11%
Private Camp/RV Park	5%
State park/Campground	5%
Own vacation home/condo	4%
Other**	2%

Base: Those in visited VT in the past 12 months (n=1283)

➤ Q6. How many nights did you stay in VT during your most recent visit to Vermont? (aided, single response)

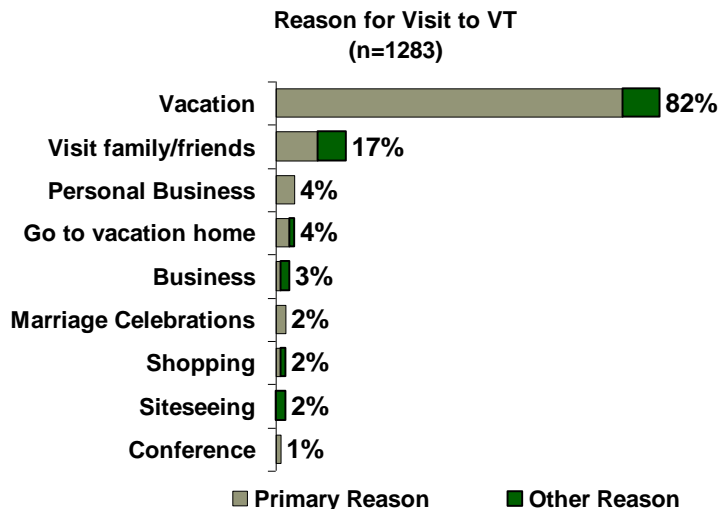
Base: Those that stayed in VT overnight (n=1170)

➤ Q6b. Please indicate how many of these nights were spent in each of the following types of lodging. (aided, multiple response)

**See Appendix for all responses

Reasons for Visiting Vermont

- Three quarters (74%) of respondents cited vacation as their primary reason for visiting Vermont, with nearly a fifth citing visiting family and friends.
 - Most (82%) stated that they visited Vermont for vacation.
- Less than a tenth (4%) of respondents reported coming to Vermont for personal business
 - The majority of visitors who came for personal business were Vermont for either college visits for a prospective or current student (34%; 16 of 47*) or to possibly relocate to the state (21%; 10 of 47*).



Top Five Personal Business Activities**

Base: Those who went to Vermont for personal business (n=47)*

College visits for prospective/current student	34%
Possible VT relocation	21%
Personal education/training program	15%
Vacation	9%
Legal proceeding/consultation	6%

Base: Those who visited Vermont in the past 12 months (n=1283)

➤ Q9. What were your reasons for your visit to VT? (aided, multiple Response)

➤ Q10. What were the primary reasons for your recent visit? (aided, single response)

Base: Those who visited VT for personal business (n=47*)

➤ Q11. In what types of personal business activities did you participate during your recent visit to VT? (aided, multiple Response)

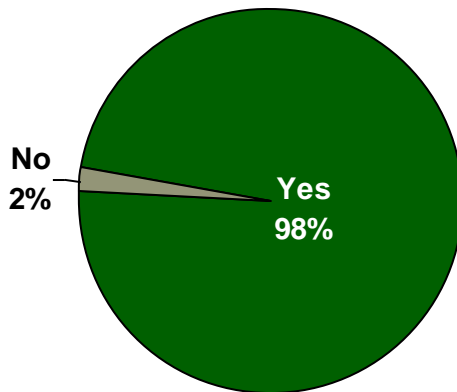
*Caution, small base size (n<50); use for directional purposes only.

**As reported by 6% of respondents or more. See Appendix A for additional responses.

Vermont Activities

- Respondents (98%) participated in at least one of the seven activities mentioned in the survey during their visit to Vermont.
- Viewing/Cultural/Learning activities (29%) were most likely to be cited as the primary leisure activity during their Vermont visit.
 - Shopping and Rest/Relaxation (such as dinning out, visiting spa/retreat, etc.) were the most popular activities reported by respondents (93% and 92%, respectively).
 - Of the endeavors listed, options related to viewing/cultural/learning (29%) activities was indicated as the primary leisure undertaking, followed by rest/relaxation (27%).

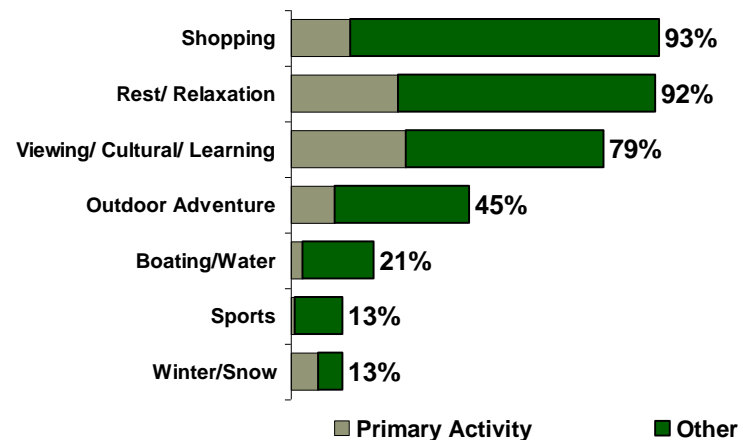
Participated in VT Activity
(n=1283)



n=1255

Types of Vermont Activities

Base: Those who participated in an activity listed in Q12
(n=1255)



Base: Those who visited VT in the past 12 months

➤Q12. Did you pursue some or any of the types of activities list below?

Base: Those who participated in an activity listed in Q12 (n=1255)

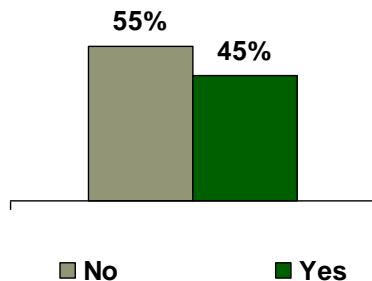
➤Q13/Q18/Q20/Q22/Q24/Q26/Q28/Q30. Did you participate in (fill in activity) while in VT?

➤Q32. Which one of the activities you just mentioned would you say was your primary leisure activity during your visit to VT? (aided, single response)

Vermont Activities: Outdoor Adventure

- More than two fifths (45%) of respondents participated in an outdoor adventure activity.
 - Of the adventure activities listed, four-fifths (80%) of respondents hiked, while more than a third (37%) enjoyed a picnic.

Participated in an Outdoor Adventure
(n=1255)



n=561

Types of Outdoor Activities**	
Base: Those who participated in an outdoor activity	
Hiking	80%
Picnicking	37%
Camping: tenting in developed area/RV	18%
Fishing	15%
Mountain/rock/ice climbing	8%
Skiing/Boarding	5%
Biking	4%
Camping: primitive/backpacking	4%
Canoeing	2%
Kayaking	2%
Sightseeing	2%

Base: Those who participated in an activity listed in Q12 (n=1255)

➤Q13. Did you participate in an outdoor adventure while in VT?

Base: Those who participated in an outdoor adventure (n=561)

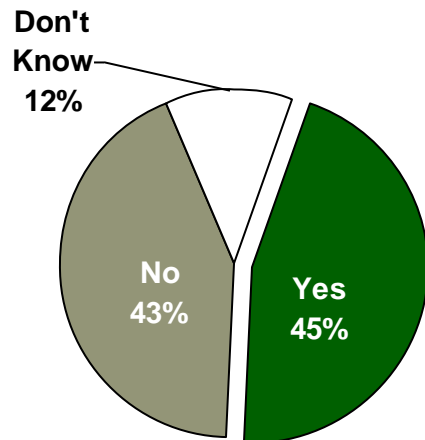
➤Q14. In what types of outdoor activities did you participate during your visit to VT? (aided, multiple responses)

**As reported by 2% or more. See Appendix for all responses

State Park Usage

- Nearly half (45%) of visitors reported using a Vermont state park during their visit.
 - More than a tenth each visited Smugglers Notch (15%) and Quechee State Park (11%).

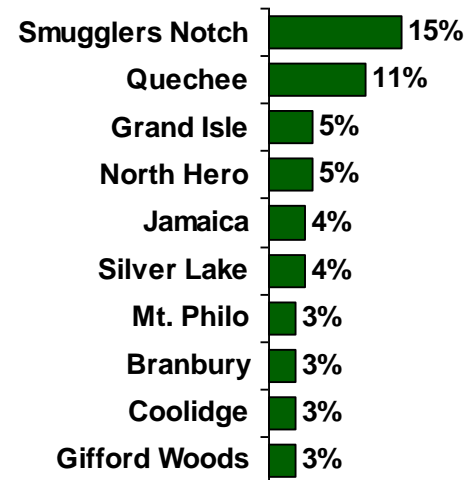
Use of State Park for Activities
(n=561)



n=254

Top Ten State Parks Used**

Base: Those who used a Vermont State Park (n=254)



Base: Those who participated in an outdoor adventure activity (n=561)

➤ Q14b. Did you use a VT State Park for any of these activities?

Base: Those who used a VT State Park for their outdoor adventure activity (n=254)

➤ Q15. Is this the first time you used a VT State Park?

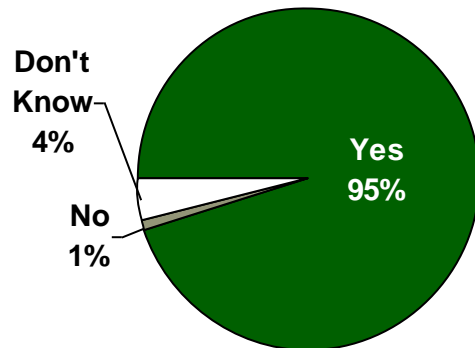
➤ Q15b. Which State Park did you use? (aided, multiple response)

**See Appendix for a full list of responses

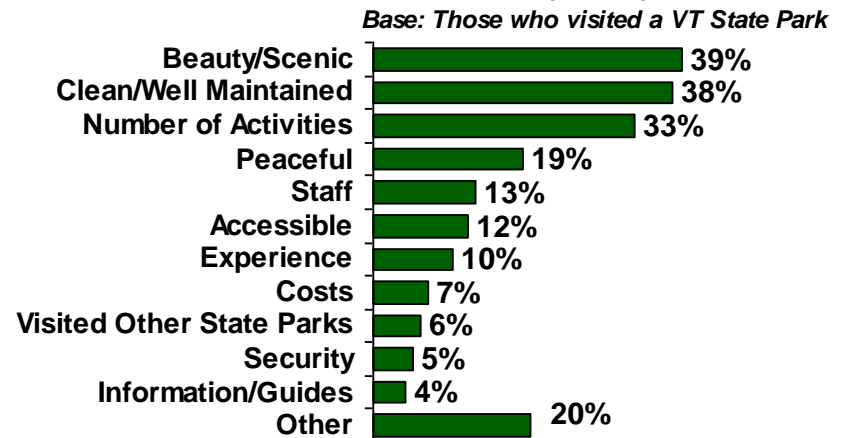
State Park Usage: Current Park Visitors

- The majority of (95%) Vermont State Park visitors reported they would visit a state park again for camping or outdoor activities.
 - Top reasons cited for repeat visits include the beauty/scenic nature of the park (39%) and the cleanliness and maintenance (38%).
 - Women were significantly more likely than men to cite the beauty/scenic nature (36% vs. 18%) and cleanliness/maintenance (36% vs. 14%) as reasons to revisit a campground.

Revisit a VT State Park Again?
(n=254)



Top Reasons for Revisiting a Campground**
(n=254)



Base: Those who used a VT State Park for their outdoor adventure activity

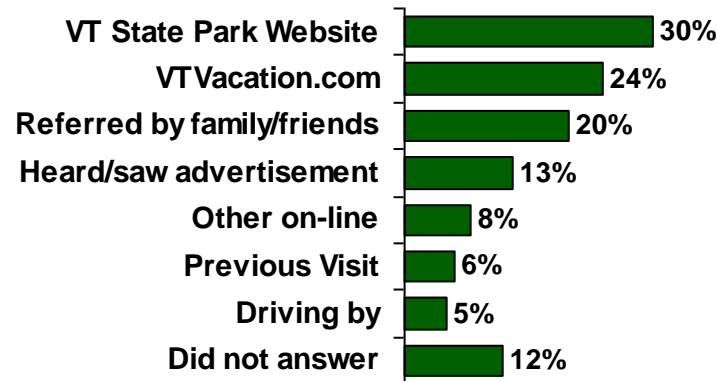
➤ Q16b. Would you visit a state park again for camping or outdoor activities?

➤ Q16c. What about your past experience make you willing/unwilling to visit a state park in the future? (unaided, open-end)

* As reported by 4% or more of respondents. See Appendix for all responses.

State Park Awareness

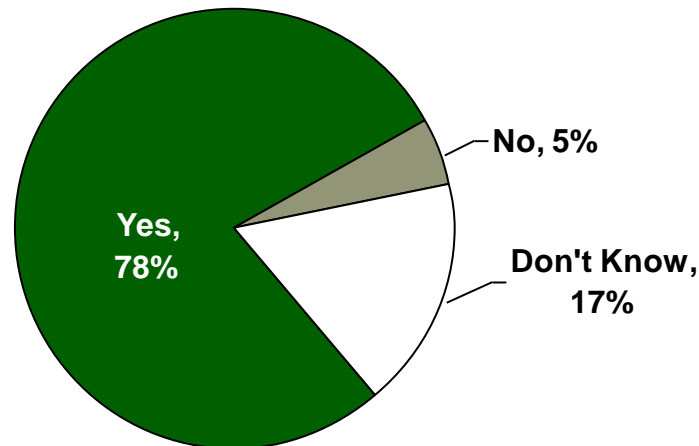
- A third of respondents attribute their initial awareness of the Vermont State Park they visited to the Vermont State Park website (30%), while a quarter (24%) cited VTvacation.com



State Park Usage: Future Park Visitors

- Over three quarters (77%) of respondents who did not use a state park for their recent visit would consider using a state park for future outdoor experiences.
 - Respondents 18-44 (87%) and 45-54 (84%) were significantly more likely to consider using a state park for future experiences than those 55 and older (66%).

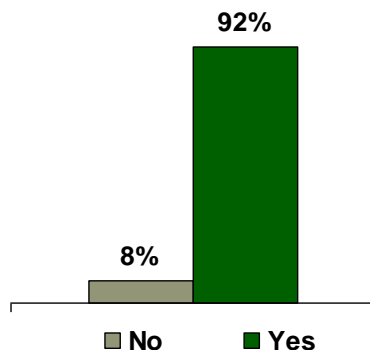
Future State Park Usage
Base: Those who participated in an outdoor activity and did not use a state park (n=307)



Vermont Activities: Rest/Relaxation

- Participants (92%) reported that they participated in rest/relaxation activities.
 - Respondents (99%) identified “dining out” as the most popular rest and relaxation activity followed by “relaxing” (74%).
 - Women were significantly more likely than men (49% vs. 35%) to cite reading as their rest and relaxation activity.

Participated in Rest/Relaxation Activity
(n=1255)



n=1159

Types of Rest/Relaxation Activities**

Base: Respondents who participated in a Rest/Relaxation activity.

Dining out	99%
Relaxing	74%
Reading	42%
Engage in local nightlife	18%
Visiting spa/retreat	8%
Sight seeing	5%
Shopping	4%
Driving/Walking Roads	2%

Base: Those who participated in an activity listed in Q12 (n=1255)

➤Q18. Did you participate in any Rest/Relaxation activities during your trip to VT?

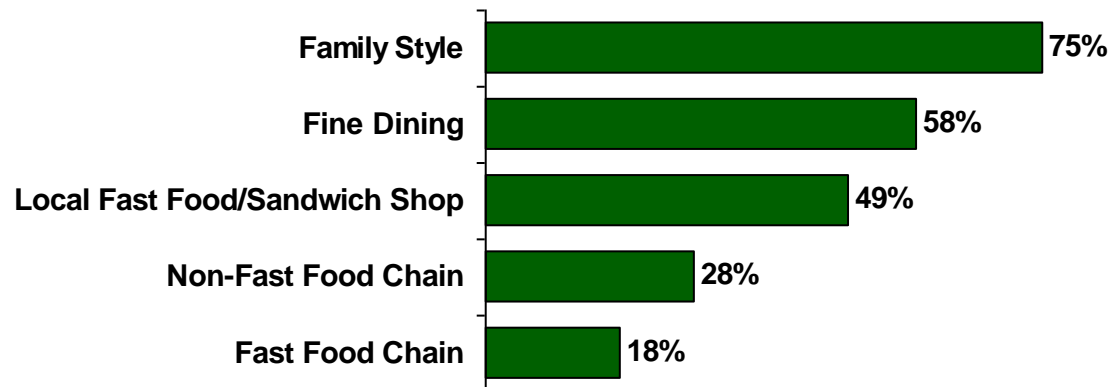
Based on those who participated in Rest/Relaxation activity

➤Q19. What types of Rest/Relaxation activities did you participate in during your visit to VT? (aide, multiple response)

** As reported by 2% or more. See Appendix for full list of responses .

Rest/Relaxation: Type of Dining Out Experience

- The majority of visitors (99%) dined out during their stay in Vermont.
- Three-quarters (75%) of people who ate out chose a family style eatery, while nearly three-fifths (55%) ate at a fine dining restaurant at least once on their Vermont trip.



Base: Those who participated in a rest/relaxation activity

➤Q19. What types of Rest/Relaxation activities did you participate in during your visit to VT? (aided, multiple response)

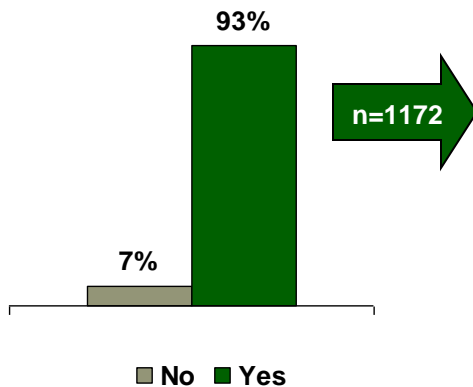
Base: Those who dined out in VT (Q19) (n=1149)

Q19b. During your recent visit to VT, what percent of your dining out experiences were at the following types of establishments.

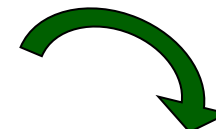
Vermont Activities: Shopping

- The majority (93%) of Vermont visitors reported that they participated in shopping activities during their trip.
 - Respondents (95%) who shopped in Vermont reported purchasing locally produced food products.
 - Two-thirds (67%) of these visitors also stated they purchased Vermont food for their family when home.

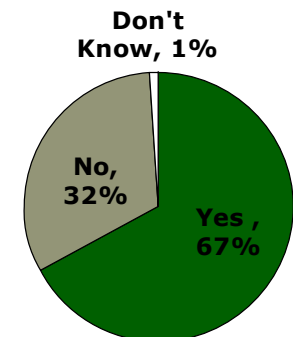
Participated in Shopping Activities
(n=1255)



Types of Shopping Activities	
Purchasing VT food products	95%
Purchasing retail items/souvenirs	73%
Purchasing VT products/crafts	69%
Purchasing antiques	13%
Other	5%



Purchase VT Food at Home
Base: Those who purchased VT food products
(n=1104)



Base: Those who participated in an activity listed in Q12 (n=1255)

➤Q20. Did you participate in shopping activities during your visit to VT?

Base: Those who participated in shopping activities (n=1172)

➤Q21. What types of shopping activities did you participate in during your recent visit to VT? (aided, multiple responses)

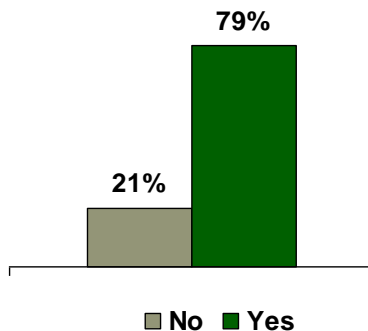
Base: Purchased VT food products (n=1104)

Q21b. When you are home do you purchase VT food products for your family?

Vermont Activities: Viewing/Cultural/Learning

- Over three-quarters (79%) of visitors reported that they participated in viewing/cultural/learning activities. Visitors over 55 were significantly more likely to participate in these activities than younger respondents (83% vs. 74% and 77%, respectively).
 - Visiting historic sites (72%) was the most popular activity among visitors who participated in a viewing/cultural/learning activity.

Participated in Viewing/Cultural/Learning
(n=1255)



n=986

Types of Viewing/Cultural/Learning

Base: Those who participated in a viewing/cultural/learning activity

Visiting historic sites	72%
Foliage/sightseeing/photography	68%
Visiting natural attractions/parks	59%
Attractions (factory tours, amusement parks)	48%
Visiting galleries/museums	44%
Visiting farm/nursery	37%
Bird/wildlife viewing	30%
Attending concerts/music festivals	19%
Attending state or regional fair	15%
Attending plays/theater	6%
Viewing sports events	3%
Other	4%

Base: Those who participated in an activity listed in Q12 (n=1255)

➤ Q22. Did you participate in any viewing/cultural/learning activities during your trip to VT?

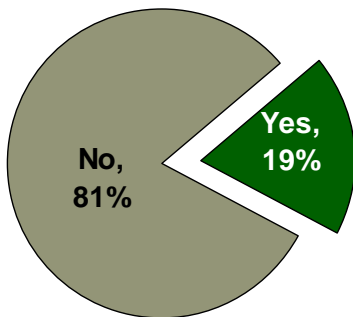
Base: Those who participated in viewing/cultural/learning activities (n=986)

➤ Q23. What types of Viewing/Cultural/Leaning activities did you participate in during your visit to VT? (aided, multiple answer)

Viewing/Cultural/Learning: Attended Concerts

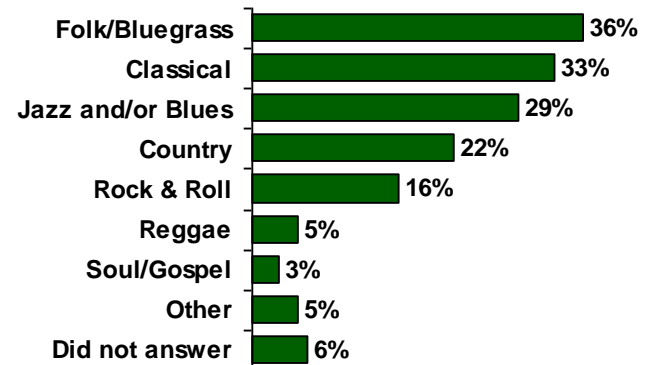
- For a fifth (19%) of visitors, attending a concert was their Vermont cultural activity.
 - Folk/Bluegrass (36%) and Classical (33%) were the most popular genres.

Attended Concerts
Base: Those who participated in a viewing/cultural/learning activity (n=986)



n=184

Type of Concert Attended
Base: Those who attended a concert



Base: Those who participated in viewing/cultural/learning activities (n=986)

➤ Q23. What types of Viewing/Cultural/Leaning activities did you participate in during your visit to VT? (aided, multiple answer)

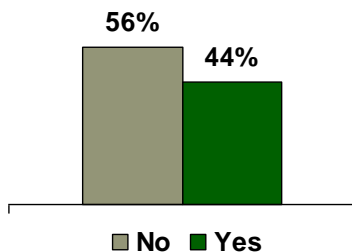
Base: Those who attended a concert (n=184)

Q23b. What types of concerts did you attend while in VT? (aided, multiple response)

Vermont Activities: Trail/Street/Road

- Over two fifths (44%) of Vermont visitors participated in a trail/street/road activity.
 - Auto touring (75%) was the most popular activity among these types of visitors.
 - Respondents 55 and older were significantly more likely than their younger counterparts to identify auto touring as their trail/street/road activity (83% vs. 71% and 68% respectively).

Participated in Trail/Street/Road Activities
(n=1255)



n=548

Types of Trail/Street/Road Activities	
Base: Those who participated in a trail/street/road activity	
Auto touring	75%
Driving back roads	65%
Bicycling	16%
Motorcycle touring	8%
Horseback riding	7%
ATV riding	2%
Other	3%

Base: Those who participated in an activity listed in Q12 (n=1255)

➤Q24. Did you participate in any Trail/Street/Road activities while in VT?

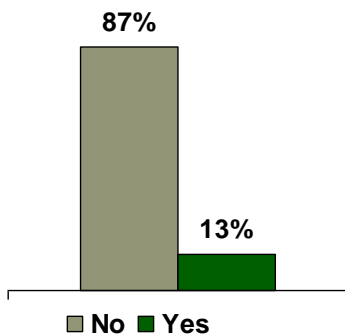
Based on those who participated in Trail/Street/Road activity (n=548)

➤Q25. What types of Trail/Street/Road activities did you participate in during your visit to VT? (aided, multiple response)

Vermont Activities: Sports

- Less than a fifth (13%) of visitors reportedly participated in a sports activity during their stay in Vermont.
 - Respondents who participated in a sports activity were more likely to visit Vermont again.
 - The most popular sports activities among these visitors were running/jogging and playing golf (41% and 36% respectively).

**Participated in Sports Activities
(n=1255)**



n=162

Types of Sports Activities	
Base: Those who participated in a sports activity	
Running/jogging	41%
Playing golf	36%
Skiing	14%
Playing tennis	10%
Playing field (team) sports	7%
Hiking	4%
Swimming	4%
Kayaking	3%
Other	8%
Did not answer	2%

Base: Those who participated in an activity listed in Q12 (n=1255)

➤Q26. Did you participate in any Sports activities while in VT?

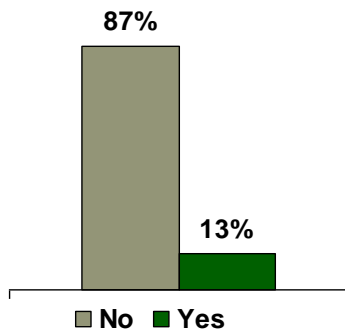
Based on those who participated in Sports activity (n=162)

➤Q27. What types of Sports activities did you participate in during your visit to VT? (aided, multiple response)

Vermont Activities: Winter/Snow

- A tenth (13%) of visitors participated in a winter/snow activity.
 - Respondents who are likely to return to Vermont (15%) were significantly more likely than their unlikely (9%) and neutral counterparts (7%) to participate in a winter/snow activity.
- Alpine skiing (65%) was the most popular winter/snow activity.

Participated in Winter/Snow Activities
(n=1255)



n=158

Types of Winter/Snow Activities	
Base: Those who participated in a winter/snow activity	
Alpine skiing	65%
Snowboarding	26%
Snowmobile riding	19%
Snowshoeing	18%
Nordic skiing/touring	17%
Ice skating	14%
Ice fishing	3%
Ice climbing	3%
Other	4%

Base: Those who participated in an activity listed in Q12

➤ Q28. Did you participate in any Winter/Snow activities while in VT?

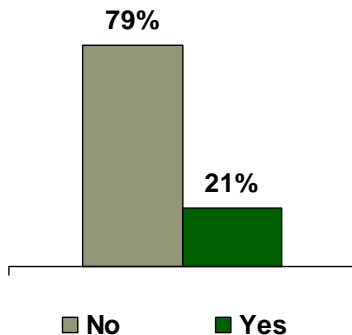
Based on those who participated in winter/snow activity

➤ Q29. What types of Winter/Snow activities did you participate in during your visit to VT? (aided, multiple response)

Vermont Activities: Water/Boating

- A fifth (21%) of Vermont visitors profiled reported that they participated in water/boating activities
 - Respondents 55 and older (26%) were significantly more likely than those 44 to 54 (12%) and 18 to 44 (10%) to take a cruise or a charter excursion.

Participated in Water/Boating Activities
(n=1255)



n=263

Types of Water/Boating Activities

Base: Those who participated in a water/boating activity

Swimming in lakes, streams, etc.	57%
Canoeing/kayaking/rafting	48%
Swimming in pools	38%
Visiting beach/water park	23%
Cruise/charter excursion	16%
Motor boating/jet skiing	14%
Sailing	3%
Snorkeling/scuba diving	2%
Other	5%

Base: Those who participated in an activity listed in Q12 (n=1255)

➤Q30. Did you participate in any Water/Boating activities while in VT?

Based on those who participated in Water/Boating activity (n=263)

➤Q31. What types of Water/Boating activities did you participate in during your visit to VT? (aided, multiple response)

Spending in Vermont

- Visitors reported lodging as their biggest expense with over a quarter (27%) of respondents spending between \$400-\$999 during their stay in Vermont.
- The majority of Vermont tourists spent \$1-\$199 on prepared meals and beverages (46%), shopping (47%), groceries (53%), and gas for their vehicle (77%).
- Over half of the visitors surveyed did not spend any money on recreation and entertainment (53%) or on transportation besides their own vehicle (80%).
 - Respondents younger than 44 years old (27%) were significantly more likely to spend \$1-\$99 on recreation and entertainment than those 44 to 54 (20%) or 55 and older (19%).

Estimated money spent on last/next trip to Vermont					
	\$0 (n=1154)	\$1-\$199 (n=1154)	\$200-\$399 (n=1154)	\$400-\$999 (n=1154)	\$1000 or more (n=1154)
Prepared Meals and Beverages	4%	46%	32%	17%	1%
Lodging	20%	19%	24%	27%	10%
Groceries	36%	53%	8%	2%	<1%
Shopping	18%	47%	21%	11%	3%
Gas for Vehicle	11%	77%	10%	1%	<1%
Recreation and Entertainment	53%	37%	7%	2%	1%
Transportation (other than personal vehicle)	80%	13%	4%	2%	<1%

Base: All respondents who provided an answer

➤33. During your trip to VT, what would you estimate you spent while in Vermont?

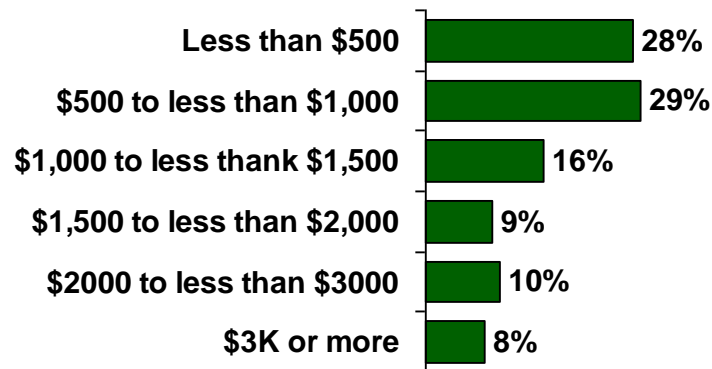
➤Q33b. For each category, please provide your best estimate for what you spent on your trip to VT.

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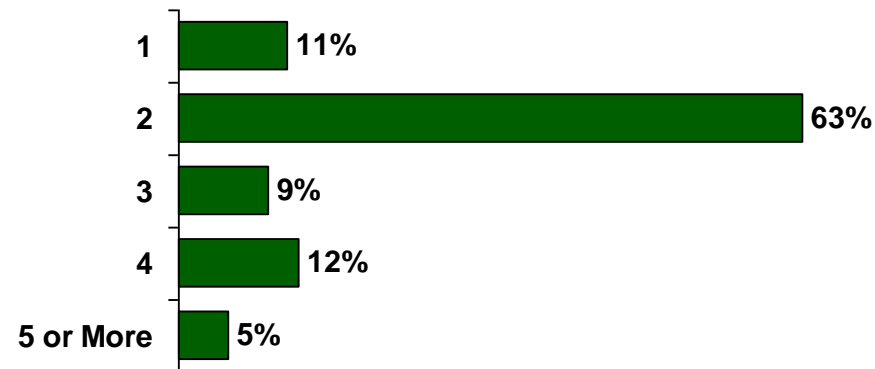
Spending in Vermont

- Nearly three fifths of respondents (58%) spent less than \$1000 while in Vermont.
 - Not surprisingly, those earning less than \$70 thousand per year were significantly more likely than their counterparts with an income of \$70 thousand or more to spend less than five hundred dollars while in Vermont (31% vs. 23% and 12%, respectively.)
- Nearly two thirds of spending estimates (63%) are based on spending for two people.
 - Respondents 18 to 44 (21%) were significantly more likely than those 44 to 54 (12%) and 55 and older (6%) to have four people in their party

Total Estimated Amount Spent in VT
(Base: Those providing an answer; n=1227)



Number of People in Estimate
(Base: Those providing an answer; n=1251)



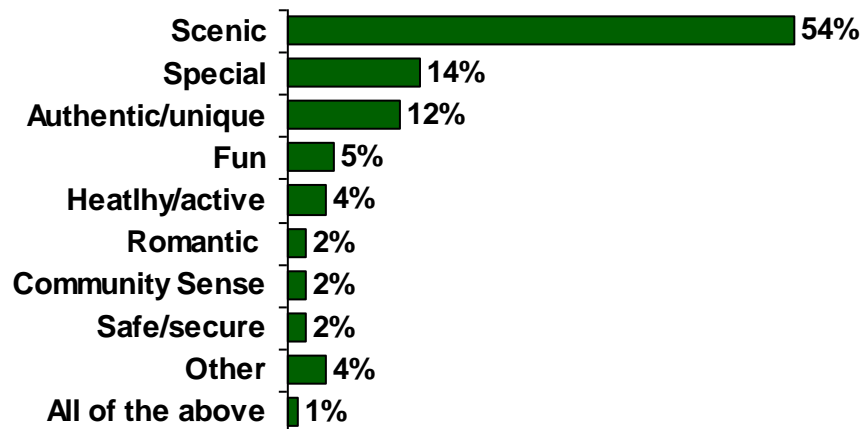
Base: All participants who provided a response in Q33

➤Q33. During your trip to Vermont, what would you estimate you spent while in Vermont?

➤Q33c. How many people does your spending response represent?

Describing Vermont: Feelings

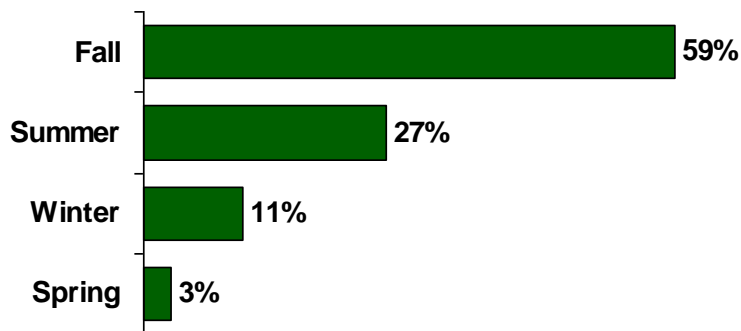
- Half of participants (54%) described Vermont as “scenic,” while more than a tenth cited “special” (14%) or “authentic/unique” (12%).
 - Respondents with less than a bachelors degree (58%) or a four year degree (58%) were significantly more likely than those with some to a full graduate degree (47%) to describe Vermont as “scenic.”
 - Conversely, those with some graduate to a full graduate degree were significantly more likely than their counterparts to describe Vermont as “authentic/unique” (17% vs. 10% and 8%, respectively.)



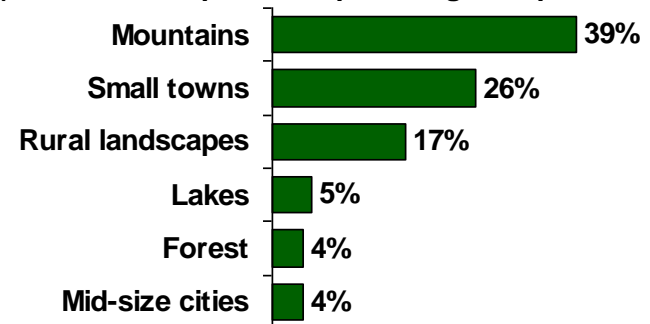
Describing Vermont: Seasons and Scenery

- Six in ten participants (60%) associate the fall with Vermont, while a quarter (27%) relate Vermont with summer.
 - Respondents 55+ were significantly more likely to associate the fall with Vermont versus their younger counterparts (68% vs. 54% and 54% respectively.)
 - In addition, respondents who are not employed full time or part time were significantly more likely to identify the fall with Vermont (66%) than those working full (57%) or part time (56%).
 - Respondents who are likely to return to VT were significantly more likely than those unlikely to return to associate Vermont with summer (30% vs. 18%).
- Two fifths of respondents (40%) stated that Vermont's mountains are the most attractive scenery, followed by the small towns (26%).
 - Respondents 18 to 44 were significantly more likely than their older counterparts to identify mountains as the most attractive scenery (46% vs. 35% and 36% respectively.)

Season Associated with Vermont
(Base: Total respondents providing a response n=1279)



Top Attractive Scenery**
(Base: Total respondents providing a response n=1280)



Base: Total respondents who provided an answer (aided, single response)

➤ Q36. What season do you associate with VT or VT images?

➤ Q36b. When you think of images of VT, what scenery attracts you most to the state?

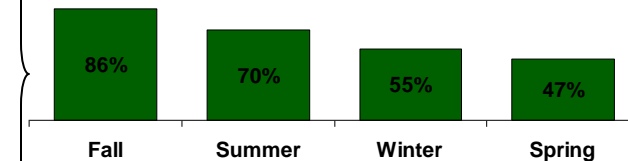
➤ **As reported by 4% or more of respondents. See Appendix A for a full list of responses

Agreement with Vermont Statements

- Respondents were most likely to agree that Vermont is a great fall vacation destination (86%) and least likely to agree that their vacation activities are child focused (16%).

Agreement with Vermont Statements (n=1283)				
	Agree	Neutral	Disagree	N/A
VT is a great vacation destination in the Fall	86%	7%	2%	5%
I tend to obtain state/ local brochures to help plan my trip	74%	17%	7%	2%
I like to do a variety of activities when on vacation	73%	22%	4%	1%
VT is a great vacation destination in the Summer	70%	16%	2%	12%
I like to keep active during vacation	62%	32%	5%	1%
VT is a great vacation destination in the Winter	55%	18%	4%	23%
I prefer to participate in outdoor vs. indoor activities while on vacation	51%	38%	8%	3%
VT is a great vacation destination in the Spring	47%	31%	5%	17%
All information I need for a vacation destination I can find online	43%	44%	11%	2%
I strive to obtain the finer things in life	34%	43%	20%	3%
Vacation destinations I am interested in must have fine dining	34%	41%	23%	2%
I tend to watch my spending when on vacation	30%	50%	18%	2%
My vacations are centered on activities for my children	16%	16%	36%	32%

Agreement with Statements: Seasonal Destination
(Base: Those who agreed with statements in Q37)

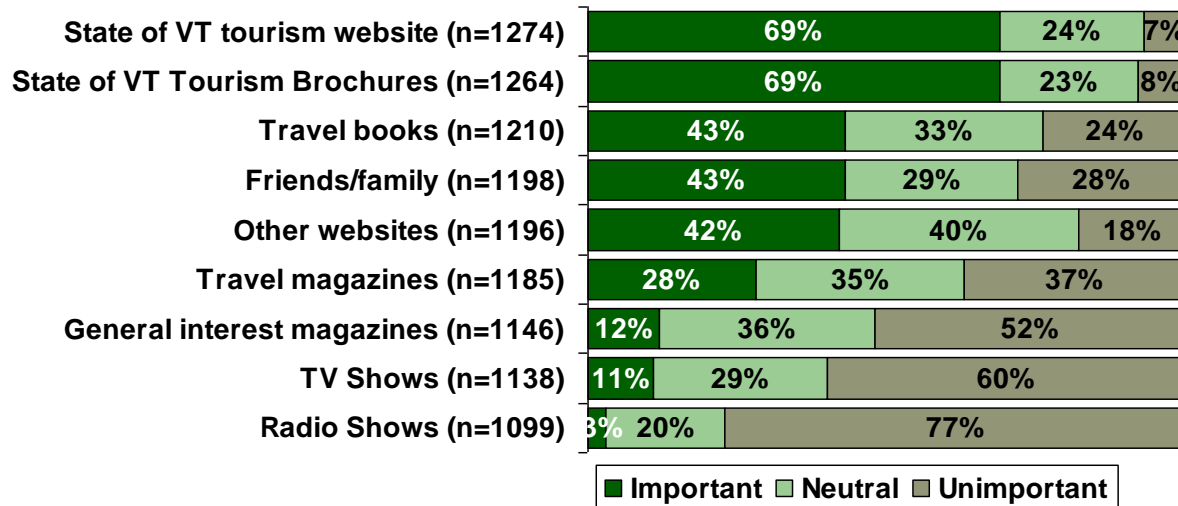


Agreement with Vermont Statements

- Some significant differences emerged across subgroups.
 - Those likely to return to Vermont in the next year were significantly more likely to participate in a variety of vacation activities (76%) than their counterparts (67% and 68%, respectively.)
 - Women were significantly more likely than men to agree that Vermont is a great summer (74% vs. 67%) and spring (50% vs. 44%) vacation destination.
 - Participants 18-44 were significantly more likely to agree that Vermont is a great winter vacation destination than their older counterparts (65% vs. 55% each).
 - Respondents with less than a bachelors degree (47%) were significantly more likely than those with a bachelors (39%) or at least some graduate work (41%) to agree that all vacation destination information can be found online.
 - Respondents who are unlikely to return to Vermont were significantly more likely than those on the fence and those likely to return to disagree that they strive to obtain the finer things in life (28% vs. 20% and 19%).

Importance of Planning Information Sources

- Of the information sources listed, Vermont Tourism products such as websites (69%) and brochures (69%), were deemed most important.
 - Respondents 55 and older were significantly more likely than those 18 to 44 to report that the Vermont tourism website (72% vs. 65%) and brochures (72% vs. 64%) were important.



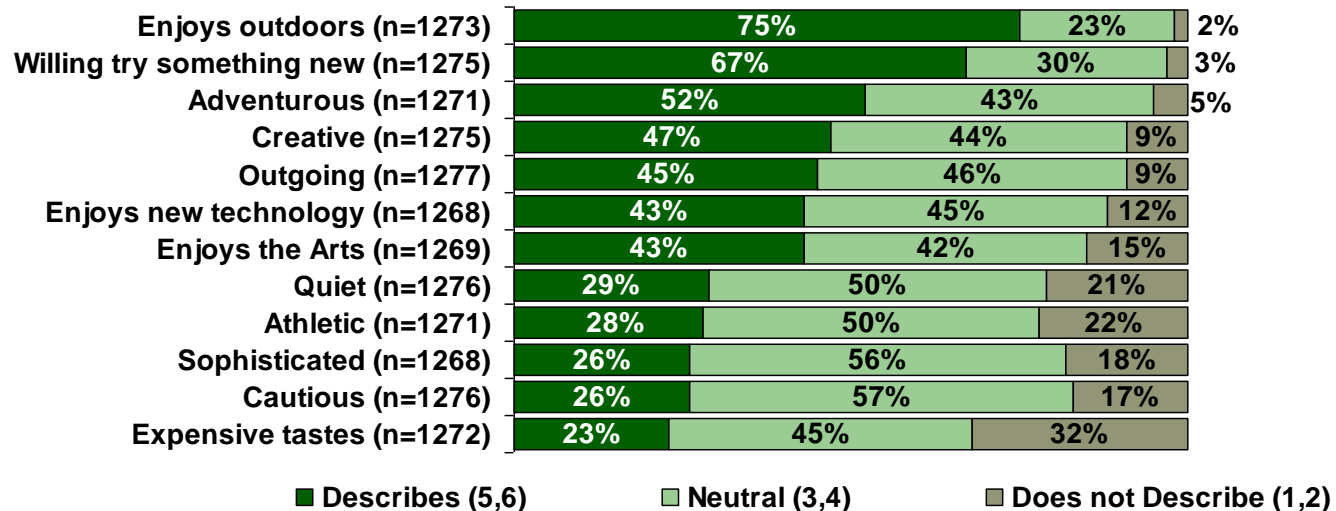
Base: Total respondents who provided a response in Q38

➤ Q38. How important/unimportant in planning your recent visit to VT were the following sources of information?

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Personal Characteristics

- Three quarters of respondents (75%) reported that “enjoys the outdoors” describes their personality, while two thirds (67%) agreed that they are “willing to try something new.”
 - Of the options listed, respondents were most likely to select “expensive tastes,” “athletic,” and “quiet” as items that do not describe their personality.





Respondent Profiles

Respondent Profiles versus 2000 Census Data

- Based on a comparison with 2000 Census Data:
 - Age:
 - Respondents between the ages of 45 and 64 was slightly skewed for this study, as more respondents fell between these ages than is representative of the national percentages (56% vs. 30%).
 - Marital Status:
 - The number of respondents who are married/partnered exceed the national census figures (81% vs. 55%).
 - Education
 - Vermont Visitor respondents were more likely to have attained a 4 year degree (26% vs. 14%) or some graduate to a graduate degree than the national average (32% vs. 8%).
 - Income:
 - Respondents reporting a household income of less than \$40,000 was well below the percentage reported by the national census figures (7% vs. 47%).

Respondent Profile and 2000 Census Data

	<u>Total</u> (n=1283)	<u>2000 Census Total</u> (N=205,118,518)
Age		
18 to 24	1%	13%
25 to 34	9%	19%
35 to 44	18%	22%
45 to 54	30%	18%
55 to 64	26%	12%
64 and Older	9%	15%
Refused	7%	--
Marital Status	(n=1283)	(N=226,379,374)
Single	10%	26%
Married/partnered	81%	55%
Previously married	7%	10%
Widowed	1%	7%
Separated	--	2%
Refused	1%	--
Children in Household	(n=322)	(N=64,565,572)
Under 6 years old	24%	31%
Between 6 and 12 years old	45%	--
Between 6 and 13 years old	--	47%
Between 13 and 18 years old	52%	--
Between 14 and 17 years old	22%	22%
Education	(n=1283)	(N=209,279,149)
Less than high school	<1%	20%
High school	9%	29%
Some college to Two year degree	30%	29%
Four year degree	26%	14%
Some graduate to graduate degree	32%	8%
Refused	3%	--

Respondent Profile and 2000 Census Data

Employment Status	<u>Total</u> (n=1283)	<u>2000 Census Total</u> (N=217,168,077)
Full-time	61%	55%
Part-time	19%	15%
Retired	9%	--
Stay at home	4%	--
Unemployed	1%	4%
Other	3%	26%
Refused	4%	--
Income	(n=1283)	(N=105,539,122)
Less than \$40,000	7%	47%
\$40,000 to less than \$70,000	22%	--
\$40,000 to less than \$75,000	--	30%
\$70,000 to less than \$100,000	21%	--
\$75,000 to less than \$100,000	--	10%
\$100,000 to less than \$150,000	19%	8%
\$150,000 or more	10%	4%
Refused	21%	--

Appendix

Transportation

Q8. – Other- What type (s) of transportation did you use to travel to Vermont?

Modes of Transportation <i>Base: Those who visited Vermont</i>	
	<i>(n=1283)</i>
Motor coach/Bus Tour	<1%
Motor coach/Bus -Commercial	<1%
RV – Rented	<1%
Truck – Tent Trailer	<1%
Kayak	<1%

Appendix: Staying in Vermont Overnight

Q6b. – Other - Please indicate how many nights were spent in each of the following types of lodging.

Types of Lodging					
<i>Base: Those who stayed in Vermont overnight (n=1170)</i>					
	1-3 Nights	4-6 Nights	7-10 Nights	11-15 Nights	More than 15 Nights
Log Cabin Rental/Resort (n=15*)	33%	40%	27%	--	--
Farm Stay (n=1*)	100%	--	--	--	--
Rudyard Kipling's Dummerston House (n=1*)	--	--	100%	--	--
Crafts bury Outdoor (n=1*)	--	100%	--	--	--
Non-Specific (n=1*)	100%	--	--	--	--

Base: Those that stayed in VT overnight (n=1170)

➤ Q6b. Please indicate how many of these nights were spent in each of the following types of lodging. (Multiple response)

*Caution, small base size (n<50); use for directional purposes only.

Appendix: Reasons for visiting Vermont

Q9. – Other - What are your reasons for your visit to Vermont

Reason for visit to VT			
Base: Those who visited Vermont (n=1283)			
Foliage	1%	Camping	<1%
House hunting/Looking to relocate to VT	1%	Children's Camp	<1%
Skiing/Boarding	1%	Literary Festival	<1%
Motor Cycle Rally (BMW)	1%	Motorcycling	<1%
Traveling through	<1%	State Fair	<1%
Food/Beverages (Cheese, Maple Syrup)	<1%	Dog Shows	<1%
Biking	<1%	Weather/Climate Change	<1%
Air Show (Burlington)	<1%	Fishing	<1%
Marathon	<1%	Lottery	<1%
Hiking	<1%	Antiquing	<1%
Deaf Retreat	<1%	Church Meeting	<1%
RV Rally	<1%	Hunting	<1%

Appendix: Personal Business

Q11. – Other - In what types of personal business activities did you participate during your visit to Vermont?

Personal Business Activities	
Base: Those who went to Vermont for personal business	
	(n=47*)
Visiting child at boarding school	2%
Children's sporting event	2%
Meeting with book conservator	2%
BMW Rally	2%
Business Meeting	2%
Picking up puppy	2%

Appendix: Vermont Activities – Outdoor Adventure

Q14. – Other - In what types of outdoor activities did you participate during your visit to Vermont?

Types of Outdoor Activities			
<i>Base: Those who participated in an outdoor activity (n=561)</i>			
Adventure games	1%	Tennis	<1%
Hunting	1%	Dog Sledding	<1%
Motorcycling	1%	Glide Ride/Para Sailing	<1%
Swimming	1%	Dinning Out	<1%
Running	1%	Golfing	<1%
Leaf Collecting/Foliage	1%	Llama Trekking	<1%
Snowmobiling	1%	Sculling	<1%
Horseback riding	1%	Snow Shoeing	<1%
Photography	<1%	Bird Watching	<1%
Shopping	<1%	Farm Tours	<1%
Boating	<1%	Gondola Racing (Stowe)	<1%
Museum visits	<1%	Snow Activities (Non-Specific)	<1%
Attending Concert	<1%	Nordic Skiing	<1%
Agricultural Fairs	<1%	Pumpkin Picking	<1%
Beach/Sunbathing	<1%		

Base: Those who participated in an outdoor adventure (n=561)

➤Q14. In what types of outdoor activities did you participate during your visit to VT? (Multiple responses) Portland Research Group, EPR/VTM VT Visitor Profiling, March 2007

Appendix: State Park Usage

Q15b. – Other - Which State Park did you use?

State Parks Used			
Base: Those who used a Vermont State Park (n=254).			
Ascutney	2%	Ricker Pond	1%
Woodford	2%	Thetford Hill	1%
Bomoseen	2%	Townshend	1%
Elmore	2%	Underhill	1%
Lake St. Catherine	2%	Lake Carmi	<1%
Molly Stark	2%	Maidstone	<1%
Brighton	2%	Stillwater	<1%
Emerald Lake	2%	Wilgus	<1%
Little River	2%	Woods Island	<1%
Button Bay	1%		
Allis	1%		
Big Deer	1%		
DAR	1%		
Fort Dummer	1%		
Half Moon	1%		

Appendix: Vermont Activities - Rest/Relaxation

Q19. – Other – What types of Rest/Relaxation activities did or will you participate in during your visit to Vermont?

Types of Rest/Relaxation Activities					
Base: Respondents who participated in a Rest/Relaxation activity (n=1159)					
Cabot, VT	1%	Entertaining	<1%	Barbecuing	<1%
Local events (VT State Fair)	1%	Real Estate	<1%	Sleeping	<1%
Museums	1%	Movies	<1%		
Antiquing	1%	College Visits	<1%		
Foliage	1%	Aquatic Center	<1%		
Biking	1%	Lectures	<1%		
Theatre (Stowe Summer Theatre)	<1%	Motorcycling tours	<1%		
Visiting friends/family	<1%	Minor league baseball	<1%		
Swimming	<1%	Wine tasting	<1%		
Farm Visits	<1%	Beaches	<1%		
Genealogy	<1%	Golfing	<1%		
Photography	<1%	Bowling	<1%		
Fishing	<1%	Canoeing	<1%		
Hiking	<1%	Ice Skating	<1%		
Boating	<1%	Attending Concerts	<1%		

Based on those who participated in Rest/Relaxation activity (n=1159)

➤Q19. What types of Rest/Relaxation activities did you participate in during your visit to VT? (Multiple-responses)

Portland Research Group, EPR/VTDM VT Visitor Profiling, March 2007

Appendix: Vermont Activities - Viewing/Cultural/Learning

Q23. – Other – What types of viewing/cultural/learning activities did or will you participate in during your visit to Vermont?

Types of Viewing/Cultural Living Activities			
<i>Base: Those who participated in viewing/cultural/learning activities (n=986).</i>			
Farmer's Market	1%	Bus Tours	<1%
Visiting Towns	<1%	Rodeo	<1%
Boat Cruise	<1%	Railways	<1%
Visiting Colleges	<1%	Shopping	<1%
BMW motorcycle event	<1%	Wine Tasting	<1%
Carriage ride (Stowe)	<1%	Bed and Breakfast	<1%
Countryside	<1%	Library Book Discussion Groups	<1%
Watching fireworks	<1%	St. Johns bury Chamber	<1%
Lipizzaner Stallions	<1%		
National holiday events (4 th of July, Labor Day)	<1%		
Dinners at the Grange	<1%		
Aquarium	<1%		
Chaffee Art in Park	<1%		
Driving Chaplain Valley Countryside	<1%		
Cycling	<1%		

Appendix: Describing Vermont: Feelings

Q35. – Other – Which of the following best describes your feeling about Vermont?

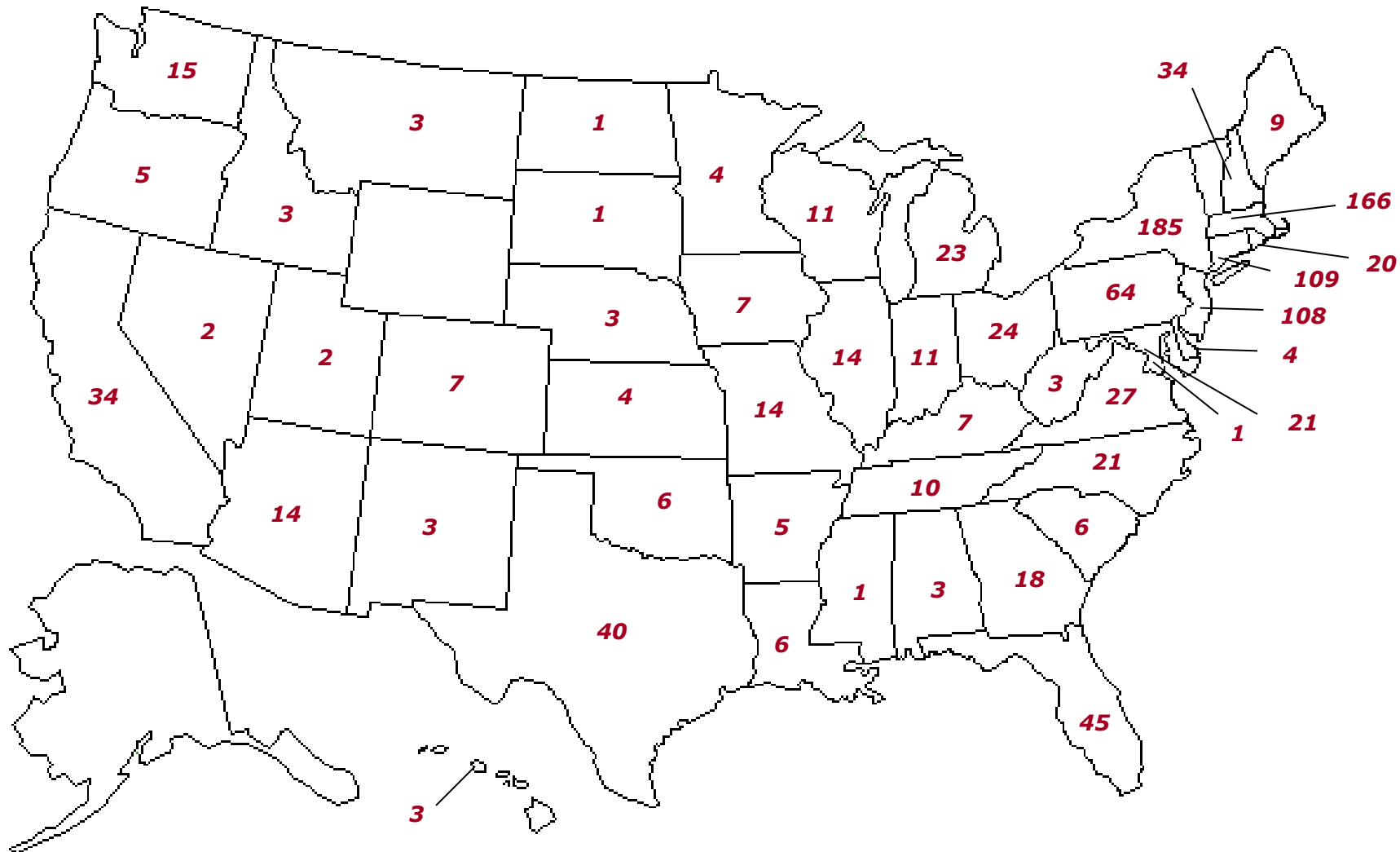
Feelings about Vermont (n=1283)			
Wonderful	<1%	Not as 'Green'	<1%
Family oriented	<1%	Less Safe	<1%
Friendly	<1%	Nice	<1%
Liberal	<1%	Rustic	<1%
Politically/Socially Aware	<1%	Wholesome	<1%
Relaxing	<1%	Awesome	<1%
New England-like	<1%	Quiet	<1%
Beautiful	<1%	Peaceful	<1%
Disgust	<1%	Safe	<1%
Home	<1%	Best of Outdoors	<1%
Rural	<1%	Unfriendly	<1%
Eco-Friendly/Organic./Clean	<1%	Healthy/Active	<1%
Socialist	<1%	Heavenly	<1%
Comfortable	<1%	Un-congested	<1%
Stress Free	<1%	Non-Specific	<1%

Appendix: Describing Vermont - Seasons and Scenery

Q36. – Other – When you think of images of Vermont, what scenery attracts you most to the state?

Attractive Vermont Scenery	
Base: Those who participated in an activity listed in Q12	
(n=1283)	
People	<1%
Golf Courses	<1%
Mountains	<1%
Snow	<1%
Waterfalls	<1%
Bubbling Brooks	<1%
State Parks	<1%
All of the above	1%

Appendix: Visitors - Geography



Base: Total respondents (n=1283)

> Q3a. Please provide the state of your primary residence.

For More Information

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